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ABSTRACT

This booklet presents findings of a study conducted to explore the status of the emerging position of school district director of employee relations. Purpose of the study was to ascertain how widespread the position is, to examine the nature of the duties being currently performed by directors of employee relations, and to develop a model job description for the position. Data for the study were gathered through a survey of practicing school administrators and educational negotiators, as well as a review of the literature on private-sector labor relations. (JG)

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Helping Administrators Negotiate

A Profile of
the Emerging Management Position
of
Director of Employee Relations
in the
Administrative Structure
of a School District

Volume I

AASA Executive Handbook Series

American Association of School Administrators
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FOREWORD

What does a director of employee relations do? What forces and conditions in contemporary employer-employee relationships generate a need for the position? Why add another administrative specialist to the corps of administrators in school systems inasmuch as such additions are harder and harder to justify as budgetary allocations for administrative/supervisory staffs are under intensive scrutiny? Can it be reasonably expected that those appointed to these new posts will be able to augment the skills of other school administrators in better management of employee relations?

To find answers to these questions, The Field Training and Service Bureau, College of Education, University of Oregon, Eugene, Ore., was employed to explore the status of the position of director of employee relations in the nation. Data were obtained from practicing school administrators, educational negotiators, and from a careful survey of the voluminous literature that has been developed in labor relations in the private sector.

One purpose of the study was to develop a model job description for the position of director of employee relations, believing that this will be useful to school districts desiring to establish such a position or wishing to modify the job content of an existing one.

Robert J. Burns, Robert L. Rose, and Kenneth A. Erickson of The Field Training and Service Bureau designed the study, collected the data, and prepared the basic manuscript. Credit is also due George B. Redfern, Deputy Executive Secretary and Beatrix Sebastian of the American Association of School Administrators for additional contributions in the preparation of the final draft of the manuscript.

It is hoped that this publication may fulfill, in part at least, the need for school administrators to become more adept in resolving the many problems that arise out of the collective negotiations process and from the stresses and strains that exist in employer-employee relations. Since a director of employee relations is so deeply involved in these processes, it is believed that the information in this publication may be useful in clarifying the duties and responsibilities inherent in that position.

Paul B. Salmon
Executive Secretary
AASA

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This work represents Volume I in AASA's Executive Handbook Series to be produced in 1974 and 1975. Additional titles in this series to be produced in 1974 include: *You and the Equal Employment Opportunity Act; Due Process: for Students and Staff;* and *Work Stoppage Strategies.* All 1974 members of the American Association of School Administrators will receive copies of the 1974 titles as part of their membership.

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PREFACE

The purpose of this study was to inquire into the status of an emerging position in the administrative structure of school systems which focuses upon two aspects of school administration, these are, developing and administering a more complete and effective program of employee relations and serving as chief adviser and spokesman in the collective negotiations process.

The intent was to ascertain how widespread the position is and the nature of duties and responsibilities being performed. In addition, by inviting incumbents in the position to indicate changes in the position that might be useful, it was hoped that a more comprehensive profile might be drawn of the position.

From the information produced in the study, it was intended that a publication would be produced which could assist school administrators and boards of education in being more skillful in conducting employee relations and in being more competent in conducting collective negotiations.

Robert J. Burns, Robert L. Rose, and Kenneth A. Erickson of The Field Training and Service Bureau, College of Education, University of Oregon, conducted the study, under contract, for the American Association of School Administrators. Their report was used to produce this publication.

CHAPTER 1

Need for Director of Employee Relations

Collective negotiations between teacher organizations and boards of education have become a way of life in America's school systems. The number of states that now have legal precedent, either authorizing or mandating collective negotiations, is gradually increasing. Nearly 70 per cent of the states now have statutes on the subject(1).

Considerable effort is being exerted, especially by employee organizations, to have federal legislation enacted which would require collective negotiations in all the states(2). If passed, the legislation would be analogous to the National Labor Relations Act of 1935 in that teachers in all 50 states would have the right to bargain collectively. The 1935 Act has been called American Labor's Bill of Rights(3). If the pending legislation now in the Congress were to be enacted, it is likely that it might be called Educational/Public Employees Bill of Rights.

In 1966, 389 comprehensive teacher-board agreements were ratified. By 1971, that number had increased to 1,529. In 1966, comprehensive agreements were reported as being ratified in thirteen states, whereas in 1971, 39 states plus the District of Columbia had reported the ratification of comprehensive agreements(4).

By 1972, the states of Pennsylvania, Vermont, and Hawaii had adopted statutes providing provisions for a limited right to strike under certain conditions(5).

This information is indicative of a recent trend that has blossomed since the early 1960's. A new educational decision-making process — called collective negotiations — has arrived upon the scene in full bloom. The increased organizational activity resulting from collective negotiations has resulted in additional tasks to be performed. The negotiations process demands considerable resource allocations in terms of time, personnel, and, most importantly, dollars.

Collective negotiations is basically an adversary process. Two sides vie for advantage. Proposals or demands are marshalled to support differing points of view, concessions may be made, trade-offs are consummated, consensus or disagreement may occur, and an agreement or contract may be signed or an impasse may result. The latter can evolve into a work stoppage or strike. These aspects of bi-lateral, formalized decision-making are often unfamiliar and threatening to school administrators not accustomed to collective negotiations.

In the early stages of bargaining, it is not uncommon for spokesmen for the employees' negotiation team to demonstrate more skill, aggressiveness, and sophistication than their counterparts on the

opposite side of the table. This is not surprising because national and state educational organizations have generally allocated massive resources to prepare their paid and volunteer representatives to engage in collective negotiations than have school boards and school administrator organizations.

School systems, generally speaking, have not been fully ready to engage in collective negotiations when it becomes mandatory due to statutes or voluntary agreement. In fact, during initial stages of negotiations, employee groups often seize the initiative and force their opponents on the defensive. Being required to react rather than be in a more even-handed position is not an advantageous posture.

Outside assistance. In these circumstances and in order to cope with these new demands, boards of education and chief school administrators may employ an "outside collective negotiations specialist," usually an attorney, to represent them at the bargaining table. In fact, the demand for the services of these bargaining experts has been and continues to be brisk and lucrative.

"Do it ourselves." At the outset, other districts, usually smaller in size, may choose to do their own negotiating. Various arrangements may be tried. Members of the board of education may function as a team, negotiating directly against the members of the employee team. The superintendent may or may not be at the table, assuming an active role, along with the board members. In other instances, a mixed management team, comprised of board members and administrators, may constitute the body to bargain with the employee team. The superintendent is usually a member of the combined board-administrator team.

Superintendent as chief negotiator. In due time, board members may decide to delegate negotiations to the superintendent and/or other administrators. The time and the range of information needed to be effective at the table requires an excessive commitment on the part of board members. They find they cannot give the time and attention to do the job as it needs to be done. Furthermore, board members recognize that they can function more appropriately as policy makers and ratifiers of the negotiated contract rather than as active participants. So, they delegate the role of chief negotiator to the superintendent.

Superintendent seeks alternatives. Later, the superintendent may come to realize that serving as chief negotiator for the board or even as an active member of the management team is more or less incompatible with other leadership duties and responsibilities that have to be performed by the chief executive. Time is too scarce a commodity to justify participation in extended negotiations. The multiplicity of top-level duties requires more time to attend to them. As additional employee groups form bargaining units and are granted recognition

to negotiate with their employer, collective negotiations tend to become an extended activity even though concentrating at certain times of the year. The superintendent understandably looks for alternatives for personal involvement in negotiations.

Information and preparation essential. The range and depth of information needed to bargain effectively with employee groups increase. More complete and reliable data are required in order to go to the table well prepared. Normative survey data become increasingly necessary to cope successfully with the demands which employee groups will bring to the table. It has long been recognized that the ablest negotiator is the one who goes to the table best prepared. To do this takes time and can be accomplished best when it is the prime responsibility of the individual serving as chief negotiator.

Time consumed in actual negotiation, as indicated earlier, is increasing by leaps and bounds. The chief negotiator must concentrate on the tasks at hand during negotiating sessions, unhampered by diversions caused by a wide variety of other tasks competing for time and attention.

Contract management. After a contract is negotiated much remains to be done. Interpreting its provisions to all staff members, briefing principals, other administrators and supervisors, monitoring the implementation of the provisions of the contract, processing grievances, and advising the superintendent and board members on a wide range of matters attendant to contract administration is a responsibility of demanding proportions.

It is obvious that the need for someone to specialize in all phases of contract management and to manage employee relations in all their aspects is self-evident. Thus, the stage is set for the emergence of a new position — director of employee relations.

Director of employee relations. An employee relations director, unheard of in most educational organizations, is becoming a key figure in school district operations.

As earlier indicated, there are expanding aspects of the negotiations process that justify a full-time specialist who can give dynamic leadership to a total program of good management-employee relations.

The four broad areas of responsibility of the director of employee relations can be classified as: (a) preparing to negotiate, (b) being management's chief spokesman at the table, (c) administering the negotiated contract, and (d) directing the total management-employee relations program.

The specific duties encompassed in these four broad areas are developed in detail in subsequent chapters.

An able director of employee relations can contribute greatly in helping management to see that much of the gains achieved at the

table are not lost in poor contract administration and in preventing deterioration in employer-employee relations in the daily operations of the school district.

CHAPTER 2

The University of Oregon Study

A job analysis questionnaire was developed and sent to members of the Association of Educational Negotiators, comprised of chief negotiators for school systems and other educational institutions throughout the country.

The questionnaire was designed not only to gather information on the current status of the job of director of employee relations, but also to focus upon optimum characteristics as identified by respondents. In short, respondents were requested to reflect their opinions on what should be as well as facts on what is. The key questions, regarding school district directors of employee relations, were:

- What critical tasks are *currently being performed*?
- What critical tasks *ideally should be performed*?
- What qualifications (education, experience, knowledge, ability, and personality) *currently characterize incumbents* in the position?
- Which of the qualifications (or others) *ideally should be emphasized?*

Of the responses received, only those from chief district negotiators were analyzed.

Geographical distribution of participants. Table 1 shows the geographic distribution of participating school districts. It will be noted that the heaviest response came from the northeast and Great Lakes states. School districts in these states were the ones in which collective negotiations first emerged and in which there is the greatest reservoir of experience.

Table 1

Geographic Distribution of Participating School Districts

Geographic Location	N	%
Northeast & Great Lakes	73	68.8
Rocky Mountains & Plains	17	16.0
Far West	14	13.2
South	1	.9
Canada	1	.9
	106	

Shaded number indicates the highest concentration of occurrences.

The responses from the 106 school districts includes 26 states and Canada. Michigan (26), Illinois (14), New York (8), California (8), Pennsylvania (6), and Kansas (6), are the states with the highest frequency of responses.

Organizational title. It is obvious that those who perform the tasks involved in management-employee relations have different titles, as is shown in Table 2.

It can be seen from the data in Table 2 that superintendents tend to perform these tasks in smaller school systems. As size of system increases the tasks tend to be delegated to assistants and associates. Only when the district becomes large, is it likely that a director of employee relations will be appointed.

Personnel administrators are also likely to be directly involved in the management of employee relations more so than other administrators or supervisors.

Table 2

Organizational Title of Persons Performing Management — Employee Relations Tasks

Organizational Title	Student Populations						
	2500 Below	5000 2501	7500 5001	10,000 7,501	40,000 10,001	Higher 40,000	Total
Superintendent	14	5	10	1	0	0	30
Ass't. / Assoc. Supt.	2	8	2	6	3	3	24
Ass't. / Assoc. Supt., Personnel	0	0	5	0	3	2	10
Director of Personnel	1	1	0	2	4	0	8
Director of Employee Relations	0	0	2	0	5	6	13
Other (Bus. Mgr. / Prin. et al)							26

Shaded number represents highest incidence of occurrence.

It is not surprising that personnel administrators are more deeply involved in the management of employee relations than other administrators and supervisors. These activities are closely related to the general functions of school personnel administration. There is some difference of opinion among school personnel administrators, however, as to the desirability of the personnel administrator being actively engaged in collective bargaining. Those who frown upon this involvement argue that the adversary nature of the process erodes the capability of the personnel administrator to perform the other personnel functions that put a premium upon amicable working relations with teachers and other employees. On the other hand, those who perform both functions hold that the stress and strains that may arise at the bargaining table need not be carried over into other personnel management activities. A skillful practitioner can accommodate both functions.

Major tasks. Activities of greatest importance, most time consuming, and most often performed personally by the director of employ-

Table 3

Major Tasks of Director of Employee Relations

Major Tasks	Per Cent of Consensus
Preparing for Negotiations	
Develop negotiation strategies for management	90
Prepare proposals and counter proposals for management	89
Analyze and evaluate employee proposals	87
Keep superintendent advised concerning negotiations	85
Know state laws, court decisions, etc., affecting negotiations	79
Secure negotiation recommendations from all management personnel	75
Negotiating at the Table	
Serve as chief spokesman for management in negotiation	88
Direct activities of management's negotiation team	84
Draft text of agreement negotiated with employee team	81
Keep management personnel informed during negotiation	76
Administering Negotiated Agreement	
Advise management personnel concerning interpretations of contract	78
Administering the Overall Employee Relations Program	
Recommend policies to improve the district's management-employee relations program	75

ee relations were defined, in the study, as major tasks. It will be recalled that four broad areas of responsibility comprise the director's job: preparing for negotiations, negotiating at the table, administering the negotiated agreement, and administering the overall employee relations program. The major tasks are classified under these headings.

They were identified on the basis of 75 per cent or greater concensus; that is, 75 per cent or more of the respondents had to certify a task as being major before it was given that classification.

Table 3 lists 12 major tasks which attained or surpassed the minimum standard and qualified to be called most crucial in the performance of the director of employee relations.

It will be noted that 11 of the 12 deal exclusively with the collective negotiations process and only one with the administration of the management-employee relations program.

Six of the 12 tasks are related to the preparation stage in the negotiations process, while four are activities that take place during negotiations.

Perhaps the reason 11 out of the 12 major tasks are directly concerned with the negotiations process, is that it is the most urgent and pressing problem confronting the school districts which have established the position of director of employee relations. As time goes by, it is likely that individuals in these positions will become more deeply involved in the total program of management-employee relations.

Minor tasks. Less important and not as time consuming as major tasks, but nevertheless important enough to warrant personal attention, minor tasks tend to be largely administrative in nature as the list below shows. (The number following each task indicates the percentage of consensus given it by the respondents.)

Administering Negotiated Agreement

Serve as chief adviser on resolution of grievances arising out of negotiated agreement	(88)
Consult with principals to insure compliance with management-employee relations policies	(86)
Initiate board requests for grievance and mediation services	(84)

Administering the Overall Employee Relations Programs

Attend local, state, and national meetings concerned with negotiations	(96)
Serve as chief advisor to management on employee relations	(93)
Conduct for management personnel inservice training on interpretation of negotiated agreements, grievance procedures, etc.	(88)
Advise principals on grievances and management-employee relations policies	(87)
Interpret management-employee relations policies to all personnel	(86)
Represent management before employee relation boards and other regulatory agencies	(85)
Assist in the selection of arbitrators	(84)
Investigate management-employee relations problems; advise superintendent accordingly	(84)
Provide information concerning rights and obligations of parties concerned in management-employee relations problems	(81)

Negotiating at the Table

Advise superintendent or appropriate communication's personnel regarding news releases relating to progress of negotiations	(82)
Maintain records of all proposals and counter proposals presented in negotiation sessions	(80)

As can be seen from the above list, 14 tasks were identified as minor. Nine of the 14 are related to the administration of the overall management-employee relations program, three with the administration of the negotiated contract, and two with table negotiation activities.

The foregoing 12 major and 14 minor tasks indicate the content of the position of director of employee relations, as perceived by incumbents in the job. These tasks describe *what is*, which was only

half of the thrust of this phase of the study. The other half was *what should be* and the data that follow are concerned with aspirational viewpoints of respondents.

More responsibility desired. Two areas of desire emerge from these data. First, there is a desire to develop and maintain better communication between the director of employee relations and other administrative personnel. Secondly, there is a need to develop and maintain more amiable management-employee relations among the various categories of personnel in the school system.

Table 4 lists tasks which directors of employee relations wish might be given greater emphasis. Six tasks are indicated, five of which relate to the administration of the overall management employee relations program and the sixth to the administration of the negotiated contract.

Table 4

Responsibilities Desired by Director of Employee Relations

Tasks	Rank Order
Administering Overall Employee Relations Program	
Conduct a continuous program to maintain good employee relations	1
Conduct inservice training for management personnel to interpret negotiated agreements, grievance procedures, etc.	3
Evaluate effectiveness of the district's management-employee relations program	4
Provide information regarding rights and obligations of parties concerned	5
Serve as chief advisor to management in employee relations matters	6
Administering Negotiated Agreement	
Consult with principals to insure compliance with management-employee relations policies	2

Fewer responsibilities desired. Directors of employee relations apparently are asked to perform duties which they do not find particularly satisfying or which they believe less relevant than the major and minor tasks which constitute the heart of the job. The tasks in-

dicated below fall in this category and are listed in order of the extent to which they are regarded as less relevant to the major and minor responsibilities of the position.

Administering Overall Employee Relations Program	
Maintaining employee personnel records	(2)
Counseling employees having problems in their work	(3)
Supervising unit determination and recognition elections	(4)
Serving as liaison between employee organizations and management	(5)
Administering Negotiated Agreement	
Serving as mediator (where necessary)	(1)
Conducting grievance hearings	(6)

If the sample of respondents reflects the typical views of directors of employee relations, it appears that they dislike tasks which dilute their roles as management's representatives. Serving as a mediator, for example, distorts this role since they could be called upon to recommend an award in favor of the employee group. Mediation infers non-biased third party intervention which, by definition, excludes negotiating parties from assuming that role.

Personnel record keeping, counseling disgruntled employees, supervising unit determination elections, and conducting grievance hearings are also regarded as being tasks which better should be done by others. While these are not unimportant tasks, they can be more appropriately performed by others less directly involved in the bilateral interaction between management and employees, so characteristic of much that directors of employee relations do.

Organizational relationships. In organizations it is essential to know the tasks staff members are expected to perform, and also, relationships within the organization. Employees must understand what is required of them, to whom they should look for direction, and the persons for whom they are to provide supervision. Most organizations clarify these relationships and define job content by means of job descriptions and organizational diagrams and charts.

Two questions, "To whom do you report?" and "Who reports to you?" were asked of school administrators having titles that stated or inferred personnel management related reponsibilities. (Those having the title of superintendent, assistant or associate superintendent were excluded in seeking answers to these two questions.)

To whom do you report? Of the 31 responses to the question, 29 indicated they reported directly to the superintendent. The other two reported both to the superintendent and the board of education. This view concurs with the educational negotiations literature and current educational practice[6]. It appears that regardless of the size or complexity of a school district, direct and continuous communications between the chief school officer and the person responsible for management's negotiation activities is seen as being imperative.

Who reports to you? The most frequent response (33 per cent) was "Nobody reports to me." Another 21 per cent reported that administrative directors and supervisors reported to them. Some indicated that junior personnel officers and their clerical support personnel reported to them.

Generally speaking, it was found that other than their immediate support staffs, very few employees reported directly to the director of employee relations. The trends concerning organizational relationships appeared to be that the director of employee relations:

- Had a line relationship with and reported directly to the superintendent of schools
- Had a staff relationship with other administrative personnel
- Had a line relationship with the members of his or her own support staff, i.e., assistants, clerical, etc., and they reported directly to the director
- Had a professional relationship with the certified, non-certified, and classified employees with whom negotiations were carried out

Qualifications required. Inquiries were made into the qualifications deemed necessary for the position of director of employee relations. Educational requirements, related prior work experiences, specific knowledge and abilities, personality, and emotional qualities were included.

Formal education. All of the respondents had earned at least a masters degree, and most (69 per cent) had graduate majors in educational administration. Almost all of them (86 per cent) received their formal negotiations training in workshops and conferences (in-service) rather than in university-sponsored classes (preservice). The results show a rather significant incidence of doctorates (28 per cent). These were held by directors of employee relations in the large districts, for the most part. In response to the inquiry, "What formal education did you receive?" the results were as follows:

A. Highest degree attained	Bachelors	0%
	Masters	69%
	Educational Specialist	3%
	Doctorate	28%
B. Graduate major	Educ. Administration	69%
	Business/Economics	6%
	Social Studies	6%
C. Undergraduate major	Social Studies	47%
	Business/Economics	13%
	Physical Education	10%
D. Formal negotiations training	Inservice (workshops and conferences)	86%
	Preservice (university classes)	14%

Related job experiences. Less than half (41 per cent) of the respondents received job related experiences through participation on teachers' and/or boards of education negotiations teams. A lesser number (15 per cent) had related experiences in private industry. No significant migration of employee relations specialists from the private sector to the public schools was evident in this study. This should not be surprising in view of state certification requirements. It is conceivable, however, that a trend toward competency-based certification can have significant implications for future selection procedures of employee relations directors in public schools.

Perhaps the most surprising discovery related to the prior job experiences of the respondents was that 23 per cent reported no prior related job experiences whatsoever.

Table 5 provides greater detail regarding related job experiences of the respondents.

Table 5

Related Job Experiences

Type of Experiences	N	%
Served on teacher's negotiation team	8	20.5
Served on board's negotiation team	8	20.5
Private industry	6	15.0
None	9	23.0
Other	8	21.0
	39	100.0

Knowledge and abilities. Most of the data relevant in this area were derived from educational negotiations literature[7]. Knowledge and ability factors considered to be of greatest importance in the performance of the responsibilities of directors of employee relations were the following:

Knowledge of:

- federal, state, and local laws and court decisions affecting management-employee relations
- current developments, trends, processes, and strategies in the field of collective negotiations
- legal aspects of preparation and interpretation of negotiated contracts
- school finance, tax and revenue structures, budgetary procedures, and resource allocations

Ability to:

- conduct negotiations sessions that lead to acceptable agreement between the parties
- plan, organize, and conduct research endeavors for the purpose of being better equipped to negotiate effectively
- prepare and present oral and written reports concisely, logically, and convincingly
- deal tactfully, cooperatively, and effectively with representatives of employee groups

Personality and emotional qualities. Responses generally clustered around four characteristics: emotional stability, professional integrity, decisiveness, and perseverance. Typical responses are shown below.

Characteristic	Typical Response
Emotional Stability	Poise, self-composure, cool, stable, self-confidence, thick skin, humor, controls anxiety
Professional Integrity	Trustworthy, fair, ethical principles, honest, sincere
Decisiveness	Firm, aggressive, determined, persuasive, dramatic
Perseverance	Patient, tolerant, persistent, enduring, tenacious

Desirable personality and emotional characteristics revealed by the respondents are corroborated in educational negotiations literature. Baker and Harris stated that the foundation of a good negotiations relationship between boards of education and teacher associations should be based on good faith and respect. Negotiators must control their tempers and maintain a sense of humor. They especially must practice patience(8).

Dempsey and Hartman maintained that there are certain personal qualifications which enable persons to become adept in the art of negotiating. A negotiator should have considerable patience and be able to understand the needs and concerns of those with whom he negotiates. The chief negotiator should be a person of integrity who views himself and others in a very positive manner. "In professional negotiations, the greatest problems stem not from what a chief negotiator thinks he said, but how others perceive what he has said."(9)

In the selection of a chief spokesman, consideration should be given to his qualities of persuasiveness and patience.

Salary and benefits. Salaries were related to geographic location. Within the United States, the highest mean salaries were in the northeast and Great Lakes region. This seems logical since collective negotiations had their origin there more than a decade ago. Collective action by teachers, in those areas, have been strongly influenced by private sector negotiations practices. This generalization probably is also applicable to school administrators and supervisors, including directors of employee relations.

Based upon respondents' replies, it seems reasonable to conclude that salaries paid employee relations directors must be coordinated with other administrative and supervisory salaries, commensurate with the scope and difficulty of duties performed. Remuneration should be at a rate comparable with other central office management personnel such as assistant superintendents and directors of personnel.

CHAPTER 3

Recommendations

This chapter summarizes the specific recommendations made by members of the University of Oregon research team. Their recommendations, resulting from the survey data, a review of industrial and labor relations literature, and educational negotiations references, relate to the establishment of the position of director of employee relations or to making modifications in an existing position.

Recommendation 1. — Organizational Title

For the purposes of clarity and consistency, it is recommended that the person in the school district performing employee relations tasks be entitled *Director of Employee Relations.*

Some school districts have administrators devoting full time to employee relations tasks. Other districts, however, assign other duties to these persons. Regardless of whether the individual must perform additional functions or may concentrate exclusively upon employee relations, the nature of the tasks (preparing proposals, drafting agreements, developing negotiation strategies, etc.) does not appear to change.

Recommendation 2. — Job Summary

The director of employee relations should be responsible for the administration of the school district's management-employee relations program. This responsibility should include the establishment and maintenance of effective communication systems between the organizational levels in conjunction with the district's communication officer; recommendation, formulation, and administration of the district's management-employee relations policies; and the administration of the collective negotiations program.

This portion of a job description, often referred to as the job statement, should provide a brief and succinct statement of specific parameters of the position so as to distinguish it from others in the organization.

Survey responses, it will be recalled, tended to cluster around the following major areas of responsibility: preparation for collective negotiations activities for management, directing at-the-table negotiations activities for management, administration of the agreement

Recommendation 3. — Organizational Tasks

A. Administration of Employee Relations Program

- Serve as chief adviser to management concerning employee relations matters
- Develop, recommend, interpret, and administer employee relations policies for management
- Implement inservice training for management in contract administration and grievance procedures
- Serve as management's representative before regulatory agencies

B. Preparation for Negotiations

- Develop negotiation strategies for management
- Prepare management's proposals and counter proposals
- Analyze and evaluate employee proposals and advise management accordingly
- Secure input from all management personnel prior to developing management's proposals
- Know state laws, court decisions, and other litigation relevant to collective negotiations

C. At-the-table Negotiations Activities

- Serve as chief negotiator for management
- Direct management's negotiation team
- Keep management personnel informed during negotiation sessions
- Draft negotiated agreements reached with employees
- Maintain records of proposals and counter-proposals presented by both parties during negotiations

D. Administration of Negotiated Agreement

- Serve as management's chief adviser in the interpretation of adopted agreements
- Serve as management's chief adviser in all grievance matters
- Consult with principals and other management personnel to assure their understanding of and compliance with adopted management-employee policies
- Initiate management's grievance and mediation activities

reached through negotiations, and administration of the overall management-employee relations program.

The major focus of the Oregon study was to define the parameters of organizational responsibility for the position of director of employee relations. Recommendation 3 identifies those tasks which constitute the main thrusts of the position.

It is important that organizational relationships be clearly defined and understood. The director of employee relations must understand to whom he reports, over whom he has supervisory responsibilities, how he relates to other administrators and supervisors, and the parameters of his responsibilities. Recommendation 4 clarifies these relationships.

> **Recommendation 4. — Organizational Relationships**
>
> The director of employee relations should have a line relationship with the superintendent and report directly to him. There should be a staff relationship with other administrative personnel. He should have a line relationship with his immediate support staff and they should report directly to him. There should be a cooperative-professional relationship with non-administrative employees.

> **Recommendation 5a. — Formal Education**
>
> Directors of employee relations must have appropriate state certification which usually specifies at least a masters degree. Formal course work should be concentrated in the area of educational administration with exposure to curriculum, business and economics, and school and labor law.

Certification requirements limit in-migration of employee relations specialists from other fields. Formal education in negotiations usually occurs (if it occurs at all) after the individual is appointed to the position. This being the case, inservice programs appear to be the most viable means available to enable the director of employee relations to gain formal training in negotiations. If competency-based certification procedures should become accepted, in-migration of specialists in collective bargaining from the private sector may increase.

> **Recommendation 5b. — Related Job Experience**
>
> None

No recommendation is made although prior job related experience is considered to be important as a qualification for appointment to the position of director of employee relations. It must be recognized that opportunities for prior job related experience in education are limited. The career pattern for most employee relations directors in education appears to be from teacher to building administrator to central office administrator. This makes it difficult to prescribe job-related experiences. Other than a relatively few transplants from industry and government, the only job-related experience opportunities possible are as members of teacher or board/administration negotiating teams.

Recommendation 5c. — Specific Knowledge and Abilities

Directors of employee relations should be able to demonstrate competence in the following knowledge and ability areas:

Monitoring of statutes — local, state and federal laws, and other relevant litigation concerning management-employee relations

Negotiations process — preparation and at-the-table activities

Contract expertise — legal ramifications involved in the preparation and interpretation of negotiated contracts

Finance — school finance, business management, budgetary matters

Communications — oral and written communications

Human relations — human relations skills

Most of the above knowledge and ability skills were derived from educational negotiations literature[10] rather than from data obtained from respondents in the study.

Desirable personality and emotional characteristics for directors of employee relations were drawn from the research findings and the negotiations literature.

Recommendation 5d. — Personality and Emotional Characteristics

The director of employee relations should have the following personality and emotional attributes:

Emotional stability — poise, self composure, confidence, sense of humor, calmness, stability, and orderliness in high conflict situations

Professional integrity — fairness, trustworthiness, honesty, and sincerity in dealing with persons with whom negotiations are being conducted

Decisiveness — firm, aggressive, persuasive, dramatic, and clearly expressive when such behavior is in the best interest of the educational program

Perseverance — patience and tenacity, but not expediency in reaching agreements with employees

Recommendation 6. — Salary and Benefits

Directors of employee relations should be compensated at a rate comparable with other key central office administrators, i.e., assistant or associate superintendents, directors of personnel, et. al.

Recommendation 7. — General Information

Each local district should establish general information items that applicants for the position of director of employee relations should know. Typical of such items might be the following: community characteristics, school district characteristics, important dates (school and community events, etc.)

Applications procedures. Necessary information regarding procedures for making formal application for the position of director of employee relations should be indicated. While the procedures must be developed locally to satisfy specific conditions, the items listed in Recommendation 8, below, are relevant.

Recommendation 8. — Application Procedures

Identifying information — name, address to whom application must be submitted

Relevant dates — for filing application, for completion of screening process, for final selection, for reporting to work, etc.

These eight recommendations reflect the findings of the study, analyses of the literature, and interpretations of the data by the researchers. The model job description that appears in Chapter 4 is a synthesis of these recommendations.

CHAPTER 4

Model Job Description
Director of Employee Relations

1. Organizational Title

"Director of Employee Relations"

2. Job Summary

The director of employee relations is responsible for the administration of the school district's management-employee relations program. This responsibility includes the establishment and maintenance of effective two-way communication systems between the organizational levels; the recommendation, formulation, and administration of school district management-employee relations policies; and the administration of the collective negotiations program.

3. Organizational Tasks

A. Administration of school district employee relations program:

1. Serve as chief adviser to management concerning employee relations matters.
2. Develop, recommend, interpret, and administer employee relations policy for management.
3. Implement inservice training for management in contract administration and grievance procedures.
4. Serve as management's representative before regulatory agencies.

B. In preparation for negotiations:

1. Develop negotiations strategy for management.
2. Prepare management's proposals and counterproposals.
3. Analyze and evaluate employee proposals, and advise management accordingly.
4. Secure input from all management personnel prior to developing management's proposals.
5. Know state laws, court decisions, and other litigation relevant to professional negotiations.

C. Collective negotiations activities at the table:

1. Serve as chief negotiator for management.
2. Direct management's negotiations team.
3. Keep management personnel informed during negotiations.
4. Draft negotiated agreements reached with employees.
5. Maintain records of proposals and counterproposals presented by all parties during negotiations.

D. Administration of negotiated agreement:

1. Serve as management's chief adviser in the interpretation of adopted agreements.
2. Serve as management's chief adviser in all grievance matters.
3. Consult with principals and other employee supervisors to assure their understanding of and compliance with adopted management-employee policies.
4. Initiate management's grievance and mediation activities.

4. Organizational Relationships

The employee relations director:

A. Has a line relationship with the superintendent, and reports directly to him.

B. Has a staff relationship with other administrative personnel.

C. Has a line relationship with immediate staff, and the members report directly to him.

D. Has a cooperative-professional relationship with non-administrative personnel with whom he negotiates.

5. Skill Requirements

A. Formal education:

1. Appropriate state certification
2. Masters degree (minimum)
3. Formal course work concentration in the area of educational administration with exposure to curriculum, business and economics, and school and labor law.

B. Knowledge and ability. Directors of employee relations must be able to demonstrate competence in the following areas:

1. Local, state and federal laws, and other relevant litigation dealing with management-employee relations.
2. The negotiations process, i.e., preparation and at-the-table activities.
3. Legal ramifications involved in the preparation and interpretation of negotiated contracts.
4. School finance, business management, and budget preparation.
5. Written and oral communications.
6. Human relations skills.

C. Personality and emotional characteristics:

1. *Emotional stability* (maintain poise, self-composure, and a sense of humor — remain cool, stable, and methodical in high conflict situations.)
2. *Professional integrity* (fair, trustworthy, honest, and sincere in relationships with persons with whom negotiations are conducted.)
3. *Decisiveness* (firm, aggressive, persuasive, clearly expressive, and dramatic when such behavior is in the best interests interest of the educational program.)
4. *Perseverance* (practice patience and tenacity — not expediency — in negotiations with employees.)

6. Salary and Employee Benefits

This section includes information regarding salary, insurance, retirement, leaves, vacations and holidays.

Compensation for this position must be determined by local and regional salary conditions; however, a rate comparable with other key central office administrators is recommended; i.e., personnel director, assistant and associate superintendents.

7. General Information

This section must be developed locally as conditions vary; however, the following factors should be included:

A. Community characteristics.

B. School district characteristics.

C. Important dates; i.e., school and community events.

8. Application Procedures

This section must also be developed locally to satisfy unique local conditions. However, the following must be included:

A. Name and address of person to whom application must be submitted.

B. Indicate all relevant dates; i.e., formal application deadline, screening, selection, and job commencement date.

NOTES

1. Robert James Burns. "A Survey of State Professional Negotiations Laws." University of Oregon, 1972.
2. John W. Maguire. "Professional Negotiations: State or Federal Legislation?" *School and Society*. March 1970, p. 176.
3. *Ibid.*
4. *Negotiations Research Digest*. November 1971, p. 20.
5. John Venditto. In an editorial published in *AEN Bulletin*. Washington, D.C., The Association of Educational Negotiators, March 1971, p. 2.
6. *ERS Information Aid*. Educational Research Service, "Chief Negotiator for the Administrator-Board Team," Washington, D.C., February 1970, p. 4.
7. Material developed by the "Institute of Industrial Relations," University of California at Los Angeles, Philip Tamoush, Coordinator.
8. Robert T. Baker, Lewis E. Harris. *Negotiations Manual*, Worthington, Ohio: School Management Institute, 1970, pp. 32-33.
9. Richard A. Dempsey, Lloyd C. Hartman. Collective Bargaining in Public Education, Sarthmore, Pennsylvania: A.C. Croft, 1970, pp. 10-12.
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